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ABSTRACT

These guides provide orientation and advanced training for Medicaid's Early and Periodic Screening Diagnosis and Treatment (EPSDT) personnel. The Trainee Workbook consists of exercises that help trainees to better conceptualize their jobs and learn how to explain EPSDT to clients. Material is included on task analysis, publicity, eligibility criteria and basic terms, common EPSDT screening procedures, effective telephone use, and other job related skills. Training Guide B focuses on the improvement of problem solving skills of experienced EPSDT workers. The guide provides a model which includes these steps for identifying and solving job performance problems: task analysis, problem identification, problem selection and clarification, problem analysis, goal identification, selection of alternatives, and implementation. Aids for the trainer are also included. (Author/RH)

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ORIENTATION

TO

EPSDT

TRAINEE WORKBOOK

by

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PS011210

Prepared by the EPSDT Training Materials Development Project at the University of Michigan School of Public Health and School of Social Work under Grant No. 47P 90036/5-01 from the Public Services Administration, Office of Human Development, U.S. Department of Health, Education and Welfare, under Sections 426 of the Social Security Act.

SPECIAL NOTE

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These training materials along with six information booklets have been prepared for use in the Medicaid Early and Periodic Screening, Diagnosis and Treatment (EPSDT) program. These materials were prepared for the Health Care Financing Administration, United States Department of Health, Education, and Welfare by the EPSDT Training Materials Development Project at the University of Michigan, a collaborative effort of the School of Public Health (Department of Medical Care Organization and Program in Maternal and Child Health) and the School of Social Work (Program for Continuing Education in the Human Services). Project Co-Directors are Eugene Feingold, Ph.D., Armand Lauffer, Ph.D., and Ruben Meyer, M.D. All products were prepared under grant number 47P 90036/5-01 from Public Services Administration, Office of Human Development, U.S. Department of Health, Education, and Welfare, under authority of Section 426 of the Social Security Act.

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Pages 1-104 can be found in "Orientation to EPSDT, Training Guide A, Trainer Instructions." Pages 105-127 in this Workbook are extracted from Trainer Instructions for use by Trainees.

INTRODUCTION

This workbook contains worksheets and handouts to accompany some of the exercises in which you will take part during EPSDT orientation training. The workbook is yours to write in and to keep as a reference when you return to your job.

Not all of the exercises require written materials. In some cases, your trainer may conduct activities not included in the workbook. Those activities do not require additional materials.

Exercise No. 1

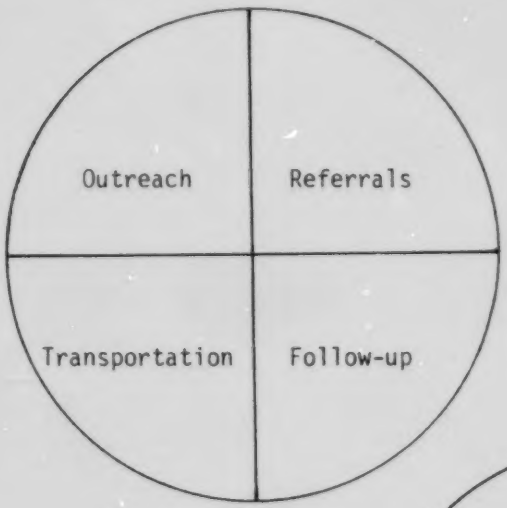
WORKSHEET

PICTURING MY JOB

Instructions:

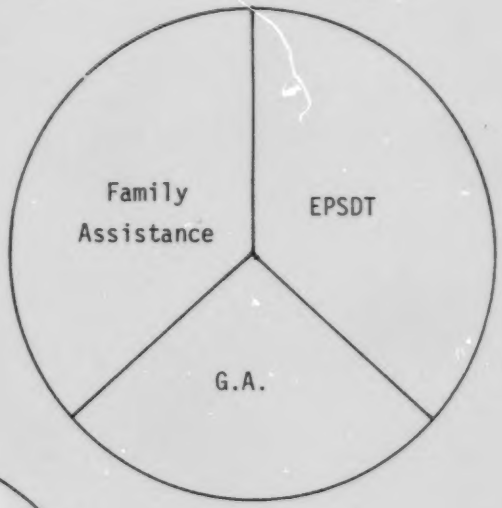
Draw a "picture of your job" in the shape of a pie, or a cake, or a donut, including the services you deliver or the activities you perform. Your pie might look like this:

Local EPSDT Worker

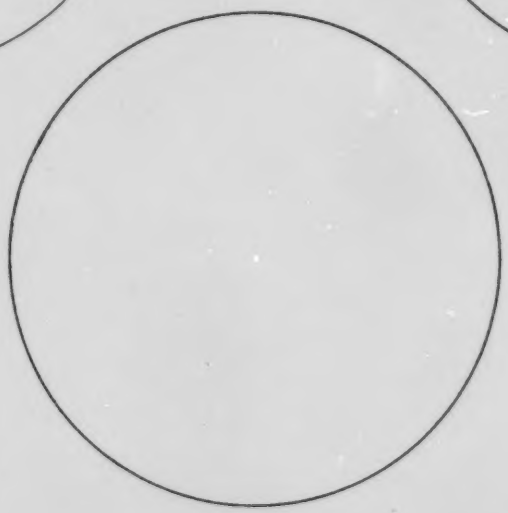


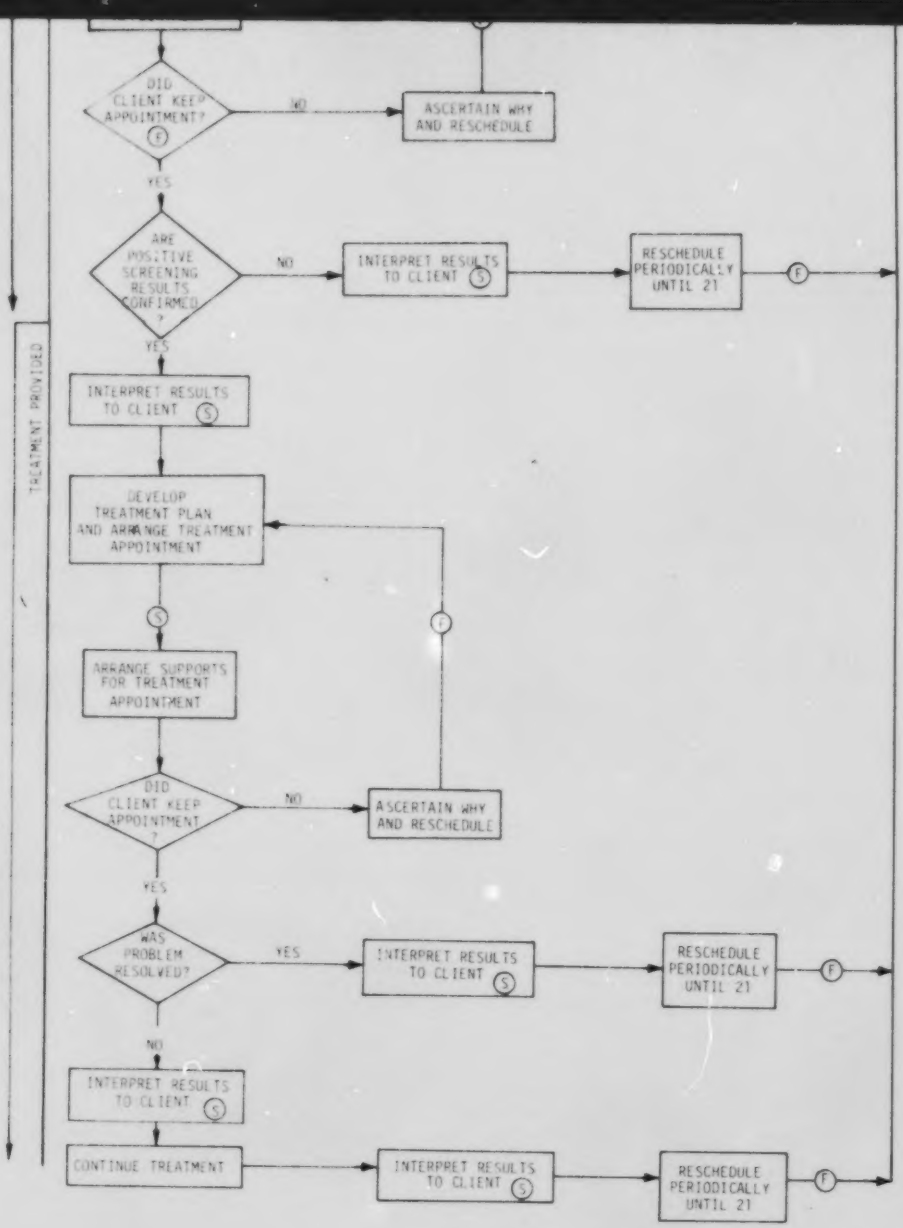
or....

Local Social Services Worker



or....





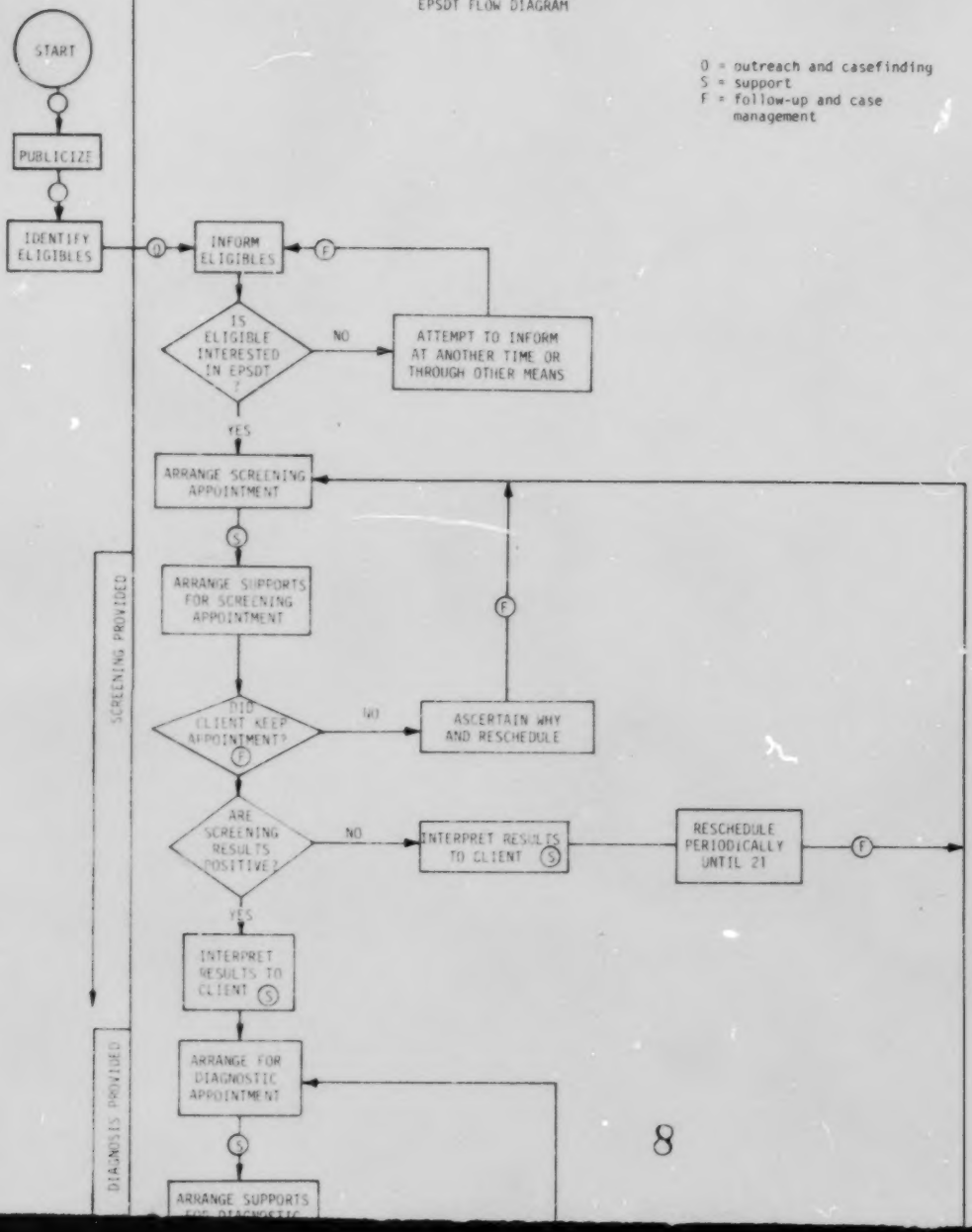
*Adapted from John L. Simon and Patricia McArdle, A Self-Instructional Module for EPSDT: Marketing EPSDT to Clients. Harvard School of Public Health, 1975.

Exercise No. 2

HANDOUT

EPSDT FLOW DIAGRAM*

O = outreach and casefinding
S = support
F = follow-up and case management



Exercise No. 3

WORKSHEET

INTRODUCTION TO TASK ANALYSIS

GOAL	OBJECTIVE (specific and measurable)	TASK (WHO does WHAT to WHOM and WHY)
Outreach/ Casefinding	Publicize EPSDT on a radio program	I make arrangements with KJCK to do the program. The EPSDT supervisor decides what to say on the program. Mary and I write the script because we want it to be in our own words.
	Inform 50 eligible clients in a one month period	
Support	Get a teenage client to an 8:00 am appointment	The teenager asks a neighbor if she can have a ride into town when the neighbor goes to work.
Follow-up/ Case Management	Contact every client after a scheduled appointment	I will keep an information system so I know when the appointments are scheduled. I will set aside an hour every morning to make sure there is time for this objective. I will go to clients' homes if they can't be reached by phone.

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Exercise
No. 5

HANDOUT

PREVENTION

1. Mr. Walker*

Mr Walker is a welfare worker who didn't understand the EPSDT program or how it works. One of his clients, Mrs. B., had a two-year-old boy. Mr. Walker was reluctant to suggest the EPSDT program because he didn't want to appear ignorant; and, of course, Mrs. B. didn't know about the program.

When John started school four years later, a squint was noticed; one eye was lazy and turned in. He could see with his good eye but because he had only one working eye he couldn't see three dimensions or perceive depth. He is having trouble learning to read, and his teacher has told Mrs. B. he is a slow learner. He will never be able to get a driver's license or work at jobs that require depth perception.

2. Manuel Ingran*

I selected training as a jet engine mechanic when I volunteered for the U.S. Air Force. After my military service, I planned to work at a big metropolitan airport where jet mechanics are paid high wages.

But I couldn't pass the entrance physical examination because I missed my Sabin oral polio doses as a kid and have a slight weakness in my arms from the mild case of polio I had in August, 1971.

Also, when I was three years old, my feet were so flat that my heel bones tilted 30° from vertical. So each year I needed a wider and wider pair of shoes. Now they say I have "platter foot" because the width of each of my feet is almost as great as the length.

I missed out on becoming a jet engine mechanic!

GOALS OF PREVENTION are:

- to STOP health problems from becoming worse;
- to PREVENT some health problems from occurring;
- to CURE an illness;
- to MINIMIZE the effects of some medical difficulties.

*Adapted from John L. Simon and Patricia McArdle, A Self-Instructional Module for Marketing EPSDT to Clients. Harvard School of Public Health, 1975.

GOAL: Community Outreach

Exercise No. 7

WORKSHEET

GETTING THE WORD OUT

OBJECTIVE (specific and measurable)	WHO	WHAT	to WHOM	and WHY

Exercise
No. 8

HANDOUT

PUBLICITY FACT SHEET

1. What EPSDT is. EPSDT stands for Early and Periodic Screening, Diagnosis and Treatment. It is a preventive health care program for eligible children and youth.

2. WHO is eligible. (varies by state)

3. How much it costs. EPSDT is available without cost to eligible children and youth.

4. EPSDT is voluntary. No one must participate if s/he doesn't want to.

5. Need for early detection of disease or disability. Many health problems, if caught in time, can save needless suffering and prevent permanent impairment.

6. Content of screening visit. Children are screened for such things as dental, visual and hearing problems, anemia, lead poisoning, sickle cell trait, tuberculosis, physical and emotional development, and more.

7. How EPSDT works. Screening appointments are usually arranged by an EPSDT worker from _____.

8. Many use own source of medical care. Clients may use their own doctor or clinic for EPSDT screening if state policy permits.

9. EPSDT is available on a continuing basis. To maintain good health care, periodic rescreenings are part of the EPSDT program.

10. Includes diagnosis and treatment. Health screening by itself is not enough. EPSDT also provides for diagnosis and treatment services--all available without cost to eligible children and youth.

11. For further information, contact: _____.

_____

Exercise
No. 9

WORKSHEET

ELIGIBILITY CRITERIA

In order to receive EPSDT services a person must be:

1. Under 21 years of age.
2. Eligible under the state's Medical Assistance Program (Medicaid).

People who fall into this group may be in some or all of the following categories depending upon state law and regulations.

( ) 1. Children from low income families who receive cash grants from the state as part of Aid to Families with Dependent Children (AFDC).

( ) 2. Children in families who receive Supplemental Security Income (SSI).

( ) 3. Children in families which are eligible for case grants but have not applied for the grants.

( ) 4. Children in foster homes or private institutions for whom the state has some financial responsibility.

( ) 5. Children in public institutions.

( ) 6. Children in unemployed father families.

( ) 7. Children in families above the financial limits for cash assistance, but classified as "medically needy" and eligible for Medicaid benefits.

Put a check in the box before each group which is eligible for EPSDT in your state.

Exercise
No. 9

HANDOUT

Public Assistance ("Welfare"):

Cash and other assistance provided to families with dependent children (AFDC) in all states. In some states other groups may be covered. In the past certain adult groups such as the blind were included under public assistance, but are now covered under Supplemental Security Income (SSI) (see below).

Medicaid:

Medical assistance available to certain categories of low income persons in medical need. Authorized under Title XIX of the Social Security Act (1965). Eligibility and benefits for Medicaid vary among states.

Medically Needy:

A term used in some states to describe those whose income is above minimum required for public assistance payments, but who need medical care.

Medicare:

A federal health insurance program for all eligible persons 65 years or older with uniform benefits. This program is different from Medicaid in that it is an entirely federal program and eligibility benefits are uniform throughout the country.

Supplemental Security Income (SSI):

Aged, blind and disabled people who have little or no income and resources receive payments under the federal program of Supplemental Security Income. The federal program replaces the former state-federal programs of public assistance for these three groups (old age assistance, aid to the blind, and aid to the totally and permanently disabled).

GOAL: Identify Eligible Clients

Exercise No. 9

WORKSHEET

DETERMINING ELIGIBILITY

OBJECTIVES	TASKS
Identify children in public institutions	I will obtain a list of all public childcare institutions in my area. I will contact each institution and explain the availability of EPSDT. I will obtain a list of all children in each institution.
Identify children in families who receive AFCD	
Identify children in "medically needy" category	

Exercise
No. 10

HANDOUT

INVENTORY OF COMMON EPSDT SCREENING PROCEDURES

Screening For	Purpose
MEDICAL HISTORY	The medical history is the first step in assessing health status. It provides a profile of a child or youth's previous health care and describes any previous health problems.
PHYSICAL EXAMINATION	The physical examination helps the screening staff discover those diseases and health problems for which no standard screening tests have been developed, including evidence of child abuse and/or neglect. The examination includes a complete head-to-toe inspection, blood pressure, temperature measurement, and observation of movement and coordination.
IMMUNIZATION STATUS Diptheria, Lockjaw (Tetanus), Polio, Measles (Rubeola), German Measles (Rubella), Mumps, Whooping Cough (Pertussis)	A check on immunization status is done to ensure that every child is protected from preventable diseases at the earliest possible age. If a child has not been immunized or has fallen behind in her/his immunization program, immunization may be provided at the screening visit.
DENTAL DISEASE TREATMENT	Since it can be predicted that almost all children will need dental diagnostic and treatment procedures, a component of dental services is included in EPSDT to assure access to dental care, to establish a permanent dental record, and to refer the child back to the dentist for periodic evaluation and treatment.
EYE PROBLEMS	Eyes are examined to detect visual impairments which could interfere with the development and education of the child.

Screening For	Purpose
HEARING	Hearing is checked to identify children who have reduced hearing sufficient to interfere with their social life and educational achievement.
GROWTH ASSESSMENT	Children are measured and weighed to help identify diseases or conditions which interfere with normal growth; for example, undernutrition or neglect.
DEVELOPMENT	Developmental assessment (an appraisal of the child's progress in terms of defined milestones of organic and functional development) is used to identify children who significantly differ from the average in psychological, neurological, emotional, or physical development. When problems are discovered, referral is made to remedial or compensatory services.
TUBERCULIN SENSITIVITY	In populations where tuberculosis is present, a test for tuberculin sensitivity is used to discover tuberculosis infection. Infected children should be treated.
BACTERIURIA	A urine specimen is examined to identify individuals who have urinary tract infections but no symptoms. Undetected urinary tract infections can lead to permanent kidney damage.
ANEMIA	A blood sample is drawn and analyzed to identify iron-deficiency anemia which may result from poor nutritional practices.
LEAD ABSORPTION	Blood lead level is assessed to prevent disability and death from lead poisoning and to alert public health officials so that they can find the source of the lead poisoning.
SICKLE CELL	Sickle cell is a genetic condition of the red blood cells found among black people. A mild form is called sickle cell trait and a severe form is called sickle cell anemia. People with sickle cell anemia are referred for the relief of symptoms. People with sickle cell are given information and counseling to help them make informed decisions about reproduction.

Exercise
No. 11

HANDOUT

HANDY GUIDE TO EPSDT

1. Preventive health screenings can eliminate tragic disabilities later in life.
2. EPSDT makes good health care available to children whose families could not otherwise afford it.
3. EPSDT is available without cost to eligible children and youth.
4. EPSDT is voluntary.
5. If they choose, clients can use their usual sources of medical care for EPSDT screenings, diagnosis and treatment.
6. Transportation and child care services are available to help clients arrange and keep their EPSDT appointments.

Exercise
No. 12

WORKSHEET

This worksheet is provided for any notes you want to make about presenting EPSDT information to clients. Note the settings and the specific clues to look and listen for as you try to promote your program.

Setting	Clues
THE WELFARE OFFICE (including the Medicaid or EPSDT unit; the waiting room, etc.)	
A CLIENT'S HOME	
A PROVIDER'S OFFICE (including doctors, dentists, clinics, other social services)	
OVER THE PHONE	

Exercise No. 12

HANDOUT

TELEPHONE COMMUNICATION CHECKLIST*

A phone call may not produce the best results, but when you do call a client, do you:

YES	SOME TIME	NO	
			1. Greet caller or person called pleasantly?
			2. Identify yourself properly?
			3. Ask if convenient to talk?
			4. Explain purpose of your call?
			5. Ask client to write down important data, i.e., appointment time, dates, addresses, phone numbers? Explain waits?
			6. Maintain a pleasant tone of voice?
			7. Empathize and/or sympathize with client's problem?
			8. Listen?
			9. Use the client's full name often and pronounce it correctly?
			10. Offer to take the message for absent co-worker?
			11. Leave word with switchboard where you are going and when you will return to your desk?
			12. Keep pencil and paper handy?
			13. Repeat agreements reached before ending the call?
			14. Speak directly into transmitter?
			15. Anticipate data you may need and have it handy?

*Keep this by your desk for a handy reference.

Exercise No. 12

HANDOUT

WORKING IN DIFFERENT SETTINGS

Setting	Advantages	Disadvantages
IN WELFARE OFFICE (including Medicaid/EPSDT unit, waiting rooms)	Saves worker's time All necessary information is readily available May seem like a more official program	Client may feel threatened Client may not be able to get there Welfare Office may have a bad image for some clients; this may rub off on EPSDT programs
OVER THE PHONE	Saves worker's time Gives client more distance; room to make a sensible decision	Impersonal Easier for client to say no Many clients don't have phones Non-verbal communication is out
IN CLIENT'S HOME	Saves client's time Client feels more comfortable Shows worker's interest because extra effort is made	Requires extra effort of worker May be noisy, too many distractions from children, etc.
IN OFFICE OF SOME OTHER SERVICE PROVIDER	May be easiest place to contact some clients EPSDT may have more positive image if related to another service in this way Can utilize support of other service provider	May not be an available setting May be noisy, no place to have a discussion
AT GROUP MEETING OF EPSDT ELIGIBLES IN SOME OTHER SETTING	Can reach a number of eligible clients at once Clients may be less threatened in a group Some group members can help convince other of benefits of EPSDT	More difficult to answer individual concerns Some group members can discourage others

Exercise
No. 14

HANDOUT

SCENARIO - APPROPRIATE RESPONSES*

Worker: (to self, approaching door) I hope Mrs. Cox is home today. It's important that I talk to her. (knocks confidently)

Client: (opening door) Hello. What do you want?

Worker: Hello. I'm looking for Mrs. Cox.

Client: I'm Mrs. Cox.

Worker: Hello, Mrs. Cox. It's nice to meet you. My name is _____, and I work at the Welfare Department. I want to talk to you about a health program available without cost for your children. (without hesitation, and enthusiastically)

Client: All right, come on in.

Worker: Thanks.

Client: Well, what about my children?....

*Adapted from John L. Simon and Patricia McArdle, A Self-Instructional Module for EPSDT: Marketing EPSDT to Clients. Harvard School of Public Health, 1975.

Exercise
No. 15

HANDOUT

USUAL QUESTIONS ASKED BY CLIENTS

1. Why take the kids to the doctor before they are sick?
2. I have been taking my children to the doctor regularly for years. Why should I go to a new place?
3. How much does it cost?
4. What's in it for me?
5. Do I have to participate?
6. Who does the screening tests?
7. What are these screening tests? What do they mean?
8. How are we supposed to get there?
9. Who will look after the other children when I go off to a screening appointment?
10. Can't I just take the kids to my regular doctor?

    Can you think of more questions?

11.
12.
13.
14.
15.

Exercise
No. 15

HANDOUT

PROMOTION CHECKLIST*

(What to include in an EPSDT interview)

1. The need for early detection of disease or disability.
2. What happens at a screening visit; relate to possible needs of client's children.
3. After screening, the need for diagnosis and treatment.
4. The importance of periodic rescreening.
5. EPSDT is a service available without cost to elegible children and youth.
6. EPSDT is absolutely voluntary.
7. Clients can use their usual source of medical care for EPSDT services.
8. Transportation and child care can be arranged if necessary.

---

*This information might also be used as a checksheet for workers to make certain they have covered the important facts when speaking about the program to other workers or community groups, as well as to clients. The information on this sheet also provides the basics for a fact sheet that might be made into a poster or advertisement of the program.

Exercise No. 20

HANDOUT

RESOURCE FILE

3 x 5 Card Format:

Front

Name of Organization/Agency/Person/Group/etc.

Address: Phone:

Contact Person(s):

Eligibility Requirements:

Financial Arrangements:

Special Information:

Back

Services Offered: Description:

1.

2.

3.

4.

5.

Looseleaf Format:

Name of Organization/Agency/Person/Group/etc.

Address:

Telephone:

Contact Person(s):

Services Offered: Description:

1.

2.

3.

4.

Eligibility Requirements:

Financial Arrangements:

Special Information:

125

GOAL: Follow-up/
Case Management

Exercise
No. 21

WORKSHEET

TASK ANALYSIS

OBJECTIVES (clear and specific)	TASKS (Who does what to whom and why)
Recontact Mrs. Lee who was unsure about EPSDT on the first contact.	
Reschedule a diagnostic appointment for Brenda Wase who missed her scheduled appointment.	
Arrange a screening appointment for Jimmy Barrett who was screened a year ago and now is scheduled to be screened again.	

Exercise No. 22

HANDOUT

SAMPLE FOLLOW-UP PLANNING SHEET

(From Follow-up Notebook)

Month: May Date:	Client	Purpose	Check If Taken Care Of
1			
2	Jill Johnson	Did keep treatment appointment?	
3			
4			
5	Kopeck children	Did keep screening appointment?	
6			
7	Bobby Bliss	Did keep diagnostic appointment?	
8	Roy Pickering	Is mother now interested in EPSDT?	
9	Morton family	Now interested in EPSDT?	
10	Margaret Spencer	Did keep screening appointment?	
11			
12			
13			
14			
15			
16	Mary and Martha McNeil	Rescheduled appointment arranged?	
17			
etc.			

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P R O B L E M S O L V I N G

I N

E P S D T

TRAINING GUIDE B

Trainer Instructions
Trainee Workbook
Aids for the Trainer

by

Carla Overberger, M.S.W.

with contributions by

Armand Lauffer
Lynn Nybell
Michael Sherraden

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NOTE TO THE READER

Medicaid programs can vary between states. Each state establishes its own criteria of eligibility and defines its own package of services within federal guidelines. This training focuses on some attempts to discuss some of the features of the Medicaid Early and Periodic Screening Diagnosis and Treatment program which are common to all states and illustrates some variations in their implementation.

Although the term EPSDT is used throughout the training, the programs which provide periodic child health screening, diagnosis and treatment may have different names in different states (e.g., Child Health Assurance Program--CHAP--in New York, Medi-Check in Illinois, Project Health in Michigan, etc.).

I.

INTRODUCTION AND OVERVIEW

INTRODUCTION TO TRAINING GUIDE B

Problem Solving in EPSDT is part of a comprehensive training program designed for EPSDT workers. The complete program includes six information booklets on EPSDT and related programs, plus Training Guide A, Orientation Training for EPSDT Workers. Guide B is designed for use with experienced EPSDT workers familiar with the basic requirements of their jobs. It may be used as follow-up to orientation training, but it is not dependent upon it.

The information booklets listed on the inside of the back cover are intended to serve as references for EPSDT workers and should be referred to when dealing with specific issues that may be raised during training. For example, the booklet, Delivering EPSDT Services, contains solutions that have been found useful by workers in dealing with problems encountered while working in EPSDT programs. The booklet, Child Health Information, contains information on children's developmental stages and life cycles.

The problem solving approach used in Training Guide B presumes that the participant brings both experience and knowledge to the learning situation. Each participant is a potential trainer, serving as a resource for his or her co-workers in the training group.

The activities in Problem Solving in EPSDT may be used to:

- provide EPSDT workers and supervisors with a means of systematically reviewing what workers do or should do in performing their job;
- provide EPSDT workers with a mechanism for identifying problems that emerge from trying to meet job requirements;
- assist EPSDT workers and supervisors in generating desired or "ideal" solutions to those problems; and
- select from among alternative strategies for "doing the best job possible."

Problem Solving in EPSDT introduces workers and supervisors to a method of identifying real problems in job performance and of generating realistic and feasible solutions to those problems. Since the desired end result is implementation of a change, training activities are best conducted with both members of a work unit and their immediate supervisors.

IF YOU ARE A SUPERVISOR of several EPSDT workers, you might:

- conduct this training with your work unit;
- combine your unit with another unit in a nearby region and train together with the other supervisor; or
- conduct this training with workers in your unit and selected related health and social services staff such as screening clinic nurses.

IF YOU ARE A STAFF DEVELOPMENT PERSON in an agency that has an EPSDT program you might:

- conduct this training with EPSDT workers and their supervisor; or
- invite workers and supervisors from another agency to a combined training session.

IF YOU ARE A REGIONAL OR STATE OFFICE STAFF DEVELOPMENT PERSON or EPSDT program specialist, you might:

- invite several local agencies to send representatives of work units and supervisors; or
- train local supervisors in the use of these materials with their own work units.

The training program is flexible and adaptable for use in numerous settings. Use your imagination!

OVERVIEW OF THE TRAINING PROCESS

The problem solving process presented in the following pages is divided into six interrelated activities. Any activity may be used independently, but for trainees to gain the most from the experience, all six should be used as an integrated and sequential process. Each activity, the estimated amount of time needed to conduct it, and the issues discussed are summarized in the diagram below. Use it to decide how you want to schedule the training program.

Time Needed on Problem Solving Activities

Activity	Estimated Time	Steps	
1	2 hrs.	TASK ANALYSIS	(What do I currently do?)
2	30 to 40 min.	PROBLEM IDENTIFICATION	(What isn't going as well as I want it to?)
3	45 min. to 1 hr.	PROBLEM SELECTION AND CLARIFICATION	(This is what to work on!)
4	1 1/2 to 1 3/4 hrs.	PROBLEM ANALYSIS AND DECIDING ON A GOAL	(Where does the problem come from? What goal do I really want it to achieve?)
5	1 1/2 hrs.	CREATING AND SELECTING ALTERNATIVES	(What might I do? I'll do it this way!)
6	1 hr., 20 min.	IMPLEMENTATION	(Give it a try!)

There are several ways to design these training activities. Look over the following suggestions. Which of these options best fits your situation? Are there other ways to schedule problem solving activities into your agency's operations?

Option 1 Conduct three part-day sessions, either consecutively or over a period of three weeks.

Day 1	1. Task Analysis 2. Problem Identification
Day 2	3. Problem Selection 4. Problem Analysis
Day 3	5. Alternatives 6. Implementation

Options 2 & 3 Conduct two part-day sessions.

Option 2		Option 3	
Day 1	1. Task Analysis	Day 1	1. Task Analysis 2. Problem Identification
Day 2	2. Problem Identification 3. Problem Selection and Clarification 4. Problem Analysis and Deciding on a Goal 5. Creating and Selecting Alternatives 6. Implementation	Day 2	3. Problem Selection and Clarification 4. Problem Analysis and Deciding on a Goal 5. Creating and Selecting Alternatives 6. Implementation

Option 4	Run one full-day session and work through all six activities. You will have to shorten and/or modify some of the activities in order to complete all six in one day.
Option 5	Set aside time for regularly scheduled staff meetings, and conduct an activity or part of an activity at each meeting.

If you are a supervisor training in your own work unit, you will probably have more flexibility to break the process into parts and run shorter sessions. If your are a regional or state level staff development person or EPSDT program specialist, training workers from many agencies, you may want to run the training in one or two time blocks. Be sure to allow time for at least one warm-up activity before you start the training. You may choose one or more from those described in Section II of this guide.

The rest of this guide is divided into two main parts: trainer instructions for each step of the problem solving process; and a trainee workbook that includes worksheets and handouts for each step. The last section of this guide, "Aids for a Trainer," contains general information about planning, preparing and conducting training as well as about managing training resources and setting up a file of such information.

If the training is run for a group, each participant should receive a copy of the workbook that appears in this guide as Section III. If you are conducting only part of the process, you may want to duplicate just the relevant parts of the workbook. The trainer's instructions are designated by the word TRAINER found at the top right hand corner of each page.

FOLLOW-UP TO THE TRAINING EVENT

Identifying problems workers face performing their jobs and selecting well considered strategies to implement solutions are the end products of the training process. Aha, you say! It is all well and good to work out ideas and plans but how can you help make certain that these plans actually do get implemented? (Remember, you have already considered the feasibility of these plans...)

What is needed now are some activities or mechanisms to help initiate and keep the plans in action. A few suggestions for doing that are listed below. While the list is by no means complete, try out one or more of these suggestions or modify them to fit your agency's needs.

- Staff meetings. Set aside a portion of regular staff meetings to explain to the whole staff one or more problem solutions identified during the training. Involve different levels of agency administration.
- Establish a problem solving reference group; composed, for example, of EPSDT workers, an administrator, and a supervisor.
- Set aside an occasional but routine problem solving hour for the work unit and supervisor to talk things over.
- Develop a training resources file for responding to workers' needs (see Section IV of this guide, "Aids for a Trainer").
- Run this problem solving activity with staff in other EPSDT related agencies to clarify the location of problems and to involve others in formulating solutions.
- What else could you do?

II.

TRAINER INSTRUCTIONS

BEFORE YOU BEGIN TRAINING

Problem Solving in EPSDT requires considerable interaction among participants. A group works together better if its members feel comfortable with one another. Even when members of the group know each other slightly, it may be worth an extra few minutes to do one of the following four warm-up exercises.

Warm-ups are most effective at the beginning of a session or right after lunch. Select one or two of these activities for use in your training sessions or develop something else you feel comfortable with. When you've done your warm-up, you will be ready to move on to the first training activity.

Warm-up Exercise #1 "ADJECTIVES"

Props: newsprint
markers
tape

The purpose of this exercise is to get members of the group to interact with one another early in the training event.

Have the group divide into two or three subgroups. Give the subgroups newsprint and markers, and ask them to take 10 minutes to write adjectives describing their work environment. It will not matter that they work in different places; a work environment is a work environment.

At the end of 10 minutes, ask the subgroups to tape their newsprint on a wall at the front of the room and read their list of adjectives. Probe for explanation of some of the adjectives; then ask some trainees how they feel about describing their work environment.

Conclude with a statement generalizing everyone's experience, e.g., the work environment is important not only for the performance of tasks, but also for the way we feel about our jobs.

Warm-up Exercise #2 "NAMES"

The purpose of this exercise is for trainees to learn each other's names.

Explain that each person is going to learn the names of everyone else in the training group. Tell them that they will go around the room one and one-half times, introducing themselves and learning one another's names.

Begin by introducing yourself. The person on your left repeats your name, and states his/her own. The third person repeats your name, the second person's name, and his/her own, etc.

Go around the room one full time, and then half again. This gives the people who began the round the opportunity to learn and to repeat a larger number of names. If the total is larger than 20, do this activity in two subgroups.

Warm-up Exercise #3 "TRUE OR FALSE"

Props: pencils
pins
large size name badges or pieces of paper

The purpose of this exercise is to learn something about the participants in the group, and to help develop an atmosphere conducive for learning and exchanging information.

Ask the participants to write two things on their badges that are true about themselves and one thing that is false. Encourage them to mingle and speak with one another for about 10 to 15 minutes. The information on the badges and an innate sense of curiosity will probably promote conversation. If the group is larger than 20, do this activity in two subgroups.

Warm-up Exercise #4 "MOVE IT"

The purpose of this exercise is to help participants get to know one another and to minimize "inclusion problems" that occur when some group members are already acquainted but others are not.

After the group is seated, ask every other person to trade seats with someone. Since acquaintances tend to sit together at first, this trade-off increases the chance that members will now be seated next to a stranger.

Ask each person to turn to the person next to him/her and conduct a five minute interview of any kind--it need not be a standard name, rank and serial number interview. Explain that everyone will introduce the person they interview to the group.

Following each introduction, give individuals the opportunity to clarify any points they feel have misrepresented them.

If the group is larger than 12 to 15, break into subgroups.

TRAINER

1	TASK ANALYSIS	◀ YOU ARE HERE
2	PROBLEM IDENTIFICATION	
3	PROBLEM SELECTION AND CLARIFICATION	
4	PROBLEM ANALYSIS AND DECIDING ON A GOAL	
5	CREATING AND SELECTING ALTERNATIVES	
6	IMPLEMENTATION	

Activity Overview: Task Analysis

Part	Activity	Time*
A	Introduction: "Task Analysis Is..." Newsprint Exercise	20 min.
B	Analyzing Your Job Handout: Problem Solving Process Worksheet: Job Description Handout: Job Description Sample: Task Statements Worksheet: Task Statements Sample: Task Analysis Worksheet: Task Analysis	1 hr., 40 min.
	TOTAL TIME	2 hrs.

*Note that some trainers and trainee populations may require less time. Others may prefer to stretch activities over a longer period. Be flexible. Do what works best for you.

ACTIVITY
NO. 1

TASK ANALYSIS

Estimated Time:	2 hrs.
Props:	newsprint, markers, tape, *Workbook*, pp. 46-53

Instructions:

Part A: (20 min.)

1. Instruct trainees to look at the first page in their *Workbook*, *Handout: A Problem Solving Process.* Be sure they read the two paragraphs underneath the diagram.
2. Introduce the material on *Task Analysis Is...*, p. 16, by summarizing the content verbally or by reproducing it and reviewing the written material with trainees.
3. Ask participants to describe the things they do every day in performing their jobs. Write their responses (tasks) on a piece of newsprint or on the blackboard at the front of the room. Encourage everyone to name at least one task. Continue until you have a fairly complete or sizeable list of tasks EPSDT workers perform.
4. Explain that these statements will be used to help group members analyze their jobs and provide the basis for an exercise in identifying job related problems and in generating solutions to them.

Part B: (1 hr., 40 min.)

1. Divide the participants into subgroups to three to five members. It is best if subgroups consist of both workers and supervisors. (It may not be necessary to break into subgroups if a work unit trains together.) Mixing workers with supervisors has the advantage of increasing the commitment to identifying real problems and generating realistic solutions.

2. Have participants turn to the *Worksheet on General Job Description*, p. 47 of the *Workbook*, and give them 10 minutes to write a general job description. When they have finished, have them turn to the next page in their workbook and look at the two sample job descriptions. The first sample includes three categories of tasks. These will be used to order the task statements you have collected.
3. Review with trainees the *Guide to Task Statements*, p. 49 of the *Workbook*. These can help participants write specific and clear task statements.
4. The next step involves the creation of an ideal job description within each subgroup. Refer back to the list you generated earlier, Part A, No. 3. Ask participants to categorize the items on this list under three major headings-- "clients," "other service providers" and "paper."

   Then ask them to think about what EPSDT workers would do to guarantee EPSDT services for eligible clients if there were absolutely no restraints on money, time, rules, etc. Encourage participants to write down all of the tasks that could be performed in the providing of services. Have them look over the *Sample: Task Statements*, p. 50 of the *Workbook*, before they begin. Use the *Task Statements Worksheet*, p. 51 of the *Workbook*, as a guide.

   Encourage trainees to suggest a wide range of activities. At a later point in the training, they will examine the difference between the ideal and the actual. Ask the subgroups to identify some tasks under each of the three headings. Although some persons may want to concentrate on only one, encourage them to

consider tasks under all three. It is important that workers be aware of the range of tasks that must be performed to do the job well.

5. Now ask the subgroups to select a single task heading to concentrate on--"clients," "other service providers," or "paper." Using the *Summary Analysis Worksheet*, p. 53 of the *Workbook*, ask them to create as complete a list of task statements as time allows. The *Summary Task Analysis Sample* on p. 52 of the *Workbook* gives trainees examples of the kinds of items they should consider. If this activity generates more ideas than there is time for, you may want to schedule additional sessions.
6. Some tasks are more important than others and some take up a larger part of the work week. "Importance" and "time spent" (frequency) may not be the same. Review with trainees the criteria for frequency and importance, on p. 16 and ask them to make the required judgements. Explain that their judgements will be useful later when they have to decide which task areas to choose for the problem solving exercise.

* * *

When task analysis precedes the rest of the training, it serves as a basis for identifying tasks that are not performed adequately and with which help is needed. If the task analysis exercise is used alone, it can be used to clarify performance expectations for an EPSDT worker, or between a worker and supervisor. Task expectations shared between worker and supervisor provide a basis for mutual involvement in performance evaluation. Individuals then know what they expect of themselves and what others expect of them. Unfortunately, mutually understood expectations do not always result in effective work performance. Problems are bound to arise. Activity No. 2 will help you identify them.

TRAINER
(may be duplicated as
a trainee handout)

TASK ANALYSIS IS...

a fancy term for looking at what people DO and ARE REQUIRED TO DO on their jobs. It consists of writing down, in an orderly fashion, all the activities involved in performing a job.

A task analysis has several functions. It can help you think about the boundaries of a job. It can serve as a basis for workers and supervisors to understand what tasks make up an EPSDT worker's job. It may ensure more accurate performance reviews when these are based on mutual understanding of what the job requires. Further, task analysis may be useful in assessing what knowledge, skills or resources workers need to best perform their jobs. It can be utilized here to clarify EPSDT workers' tasks and to identify problems in job performance. Then solutions to those problems can be generated.

The stages of task analysis include:

- a general description of the job you are analyzing;
- a written series of statements defining a specific unit of work within the job; and
- a combining of these statements to form a specific job description.

To help you interpret the information developed by doing a task analysis, consider two important dimensions of tasks: the frequency of occurrence and the importance of the task.

"Frequency" may be defined by the number of times a task is done, either in a specific time period (every day, once a week, once a month, etc.), or in more descriptive terms ("rarely," "occasionally," "constantly").

"Importance" may be defined by your perception of a task and/or by the requirements of your job. Importance may not necessarily coincide with frequency. You may rate the tasks 1,2,3 to indicate how important you think they are. (1 = very important, 2 = important, 3 = less important.)

These two criteria--frequency and importance--may help you in determining how you use your time. An unimportant task, occurring infrequently, will not be of as much concern as one that is important, occurs frequently, or both.

1 TASK ANALYSIS

2 PROBLEM IDENTIFICATION ◀ YOU ARE HERE

3 PROBLEM SELECTION AND CLARIFICATION

4 PROBLEM ANALYSIS AND DECIDING ON A GOAL

5 CREATING AND SELECTING ALTERNATIVES

6 IMPLEMENTATION

Activity Overview: Problem Identification

Part	Activity	Time
A	Introduction: "Problem Identification Is..."	5-10 min.
B	Problem Identification Sample Worksheet	25-30 min.
	TOTAL TIME	30-40 min.

ACTIVITY NO. 2

PROBLEM IDENTIFICATION

Estimated Time:	30 to 40 min.
Props:	Newsprint, markers, tape *Workbook* p. 54-55, extra *Problem Identification Worksheets*

Instructions:

Part A: (5 to 10 min.)

1. Introduce the material, *Problem Identification Is*, from page 20. Summarize it verbally or reproduce it as a handout for use by the trainees.
2. If possible, divide the participants into subgroups consisting of people from the same work unit. It is a good idea to use the same subgroups you used in Activity No. 1. (If the group contains only supervisors or other people from different units, you may have to spend more time on the "Implementation" stage later.)
3. Have participants turn to the *Task Analysis Summary Sheet* developed in Activity No. 2. Using the information on these summary sheets, tell participants to transfer the appropriate information onto the *Problem Identification Worksheet*. As in Activity No. 1, have trainees look at the *Problem Identification Sample*, p. 54, before they start writing. Each subgroup member should place a check next to those tasks that s/he feels presents a problem, and note briefly what that problem is. If supervisors participate, they may make a judgement either on the problems found by their work units, or in their own performance.

Part B: (25 to 30 min.)

Give the subgroups an extra *Problem Identification Worksheet* and ask them to combine their answers. As subgroup members provide input, they should indicate briefly "what" the problem is. After problems have been identified, it is time to select one or two for concentration and clarification.

TRAINER
(may be duplicated as
a trainee handout)

PROBLEM IDENTIFICATION IS...

the stage in the problem solving process in which you compare information of "what you as a worker actually are able to do" with a notion of what ideally you should be able to do. In this activity, you will compare your notes on an "ideal" job with the tasks of your real job.

This process accomplishes two things. First, it will give you a list of areas in which your performance is consistent with your list of ideal tasks. Success stories are often overlooked and you deserve a little reinforcement. Second, you may use this process to systematically identify problems faced on your job.

> A problem exists when there is a gap between what you are able to do and what you ideally should or would like to be able to do.

If you are an EPSDT worker, the next activity can be used to identify the tasks presenting difficulty or that you would like to do better.

If you are a supervisor, think about tasks that give trouble to the workers in your unit. For supervisors, problem identification may be based on a review of case records, case conferences, observation, and client and worker feedback.

TRAINER

ACTIVITY NO. 3

1	TASK ANALYSIS	
2	PROBLEM IDENTIFICATION	
3	PROBLEM SELECTION AND CLARIFICATION	◀ YOU ARE HERE
4	PROBLEM ANALYSIS AND DECIDING ON A GOAL	
5	CREATING AND SELECTING ALTERNATIVES	
6	IMPLEMENTATION	

Activity Overview: Problem Selection and Clarification

Part	Activity	Time
A	Introduction: "Problem Selection and Clarification Are..."	10 min.
B	Selecting a Problem Handout	15-20 min.
C	Clarifying the Problem Sample Worksheet	20-30 min.
	TOTAL TIME	45-60 min.

ACTIVITY NO. 3

PROBLEM SELECTION AND CLARIFICATION

Estimated Time:	45 min. to 1 hr.
Props:	newsprint, markers, tape, *Workbook* p. 24

Instructions:

Part A: (10 min.)
Introduce the material, *Problem Selection and Clarification Are...* from page 24, either by summarizing or reading the content, or by reproducing and reviewing the material with participants.

Part B: (15-20 min.)
Using the *Handout for Problem Selection*, p. 56 of the *Workbook*, review the rules for achieving group consensus. Each subgroup is to select one problem to work on. Most subgroups will begin by identifying several problems. You will have to help them decide which one to work on first.

Part C: (20-30 min.)

1. Once the subgroups have agreed on the problem they will work on, ask them to turn to the *Problem Clarification Sample* and *Worksheet*, p. 57 and 58 of the *Workbook*. Each subgroup must clarify a specific problem. Review the sample sheet and make certain participants understand the guides for clarifying problems discussed in Part A above.

2. Ask each subgroup to develop a problem statement for the agreed upon problem.
3. At the end of the session, ask each subgroup to share its problem statement with the whole group.

You are now ready to move on to problem analysis--finding out what the problem really is.

TRAINER
(may be duplicated as
a handout for trainees)

PROBLEM SELECTION & CLARIFICATION ARE...

selecting something to work on, and then stating as clearly as possible what that something is. Given the limits on your time and energy, you cannot give immediate attention to all the problems you have identified. You may never get to some; others may be outside of your control or ability to change. So, selecting the problem to work on is important.

Two questions may guide your choice:

1. IS THE PROBLEM IMPORTANT?
   That is, does it have a real impact on you as an EPSDT worker? Does it stop you from doing something you or your supervisor thinks is important? For example, do clients receive poor service because of this problem? Looking at it from a slightly different angle, ask yourself: "Am I going to be motivated to deal with this particular problem?" Carefully consider your interest level in finding a solution. Some amount of self-discipline is necessary for problem solving. Without it, problem solving is not likely to be a successful activity.

2. WILL YOU HAVE THE TIME, ENERGY AND RESOURCES TO DEAL WITH THE PROBLEM?
   Problems are deceptive--some may look small but hide endless complexities. Making a "best guess" determines whether the problem solving effort will effect any constructive change. Some problems are totally outside of the worker's control. Others may seem unsurmountable, but with effort can be solved.

In the following activity, you will select a problem to work on.

Having selected a problem, you will have to get it down to size if you are going to deal with it successfully. Begin by identifying who or what is involved. Then specify where it is located, and when it occurs. The more specific your problem statement, the easier it will be to select an alternative to solve or contain the difficulty.

As you work through the process of specifying the problem, you may find that you are actually dealing with multiple problems. Break these down into separate and specific problem statements, and work each one through individually.

ACTIVITY NO. 4

1. TASK ANALYSIS
2. PROBLEM IDENTIFICATION
3. PROBLEM SELECTION AND CLARIFICATION
4. PROBLEM ANALYSIS AND DECIDING ON A GOAL ← **YOU ARE HERE**
5. CREATING AND SELECTING ALTERNATIVES
6. IMPLEMENTATION

Activity Overview: Problem Analysis

Part	Activity	Time
A	Introduction: "Problem Analysis Is..." The Case of the Pokey Elevators	10 min. (optional)
B	Analyzing a Problem Handout Sample Worksheet	50-60 min.
C	Setting a Goal Introduction/Review Sample Worksheet	30 min.
	TOTAL TIME	90-100 min.

ACTIVITY NO. 4

PROBLEM ANALYSIS AND DECIDING ON A GOAL

Estimated Time: 1 1/2 hrs. to 1 hr., 40 min.

Props: *Worksheets*, p. 59-63 of *Workbook*

Instructions:

Part A: (10 min.)

Introduce the material, *Problem Analysis Is*, p. 29, either by summarizing the content or by reproducing and reviewing the material with trainees.

If you are comfortable doing so, read or tell the story *"The Case of the Pokey Elevators,"* which illustrates in a humorous manner how varying perspectives of problem analysis may lead to different conclusions (p. 29-31).

Part B: (50-60 min.)

1. Have participants refer to the *Handout*, p. 57 of the *Workbook* and review with them the guidelines for problem analysis. Have the subgroups identify a problem statement they will work on. Then, have them look at the *Problem Analysis Sample*, p. 60 of the *Workbook*.
2. Using the *Problem Analysis Worksheet*, p. 61 of the *Workbook*, have participants analyze their problem statement. To do this, each subgroup must fill out the boxes describing where the problem IS and where the problem IS NOT. On the basis of the differences brought to light, the subgroup brainstorms possible causes of the differences.

   By discussing the EXTENT TO WHICH the causes may explain where the problem IS or IS NOT part, they can

test their hunches. The result of this exercise should be the selection of the "most probable cause or causes" of the problem, plus a direction for participants' problem solving energies.

Part C: (30 min.)

1. Review with participants the material on p. 32, *Review and Writing Goal Statements*, either by summarizing the content or by reproducing and reviewing the material with trainees.
2. Have participants turn to the *Goal Statement Sample and Worksheet* and review the sample with them, p. 62-63.
3. Ask the subgroups to first identify whether, for their problem, the goal will be designed to:
   - eliminate or reduce the problem;
   - adapt to the effects; or
   - buy time.
4. With that decision made, have all the subgroups generate a goal statement for the problem they have identified and analyzed.

TRAINER
(may be duplicated as
a handout for trainees)

PROBLEM ANALYSIS IS...

pinpointing causes for a particular problem and deciding on the desired outcome. Locating the most probable reason for the gap between where you are and where you want to be, and then clearly stating where you want to be are the steps involved in problem analysis. Many of us have our own pet problem causes, but we have often arrived at our conclusions in a very unsystematic way. Intuition sometimes is right, but sometimes we are very mistaken.

* * * * * * * * *

THE CASE OF THE POKEY ELEVATORS (optional)

Once upon a time, a very responsible manager of a 20-story office building in New York City was besieged by complaints from his tenants. "The elevators are too slow!" they complained in a chorus. Being a responsible manager, he immediately called an engineering firm to have a look at the problem.

After an exhaustive study utilizing stop watches and traffic flow charts, the engineering firm gave him a proposal for the installation of two newer and faster elevators in the existing shafts. The price tag was $100,000 for an average time gain of 3.335 minutes from top to bottom for each elevator. This saved an average of 20 seconds off the waiting time on each floor. "My, that's alot of money," he said, "and 20 seconds is not a lot of time. I'll let you know."

Since he was also responsible to the building owners, he called another firm. After another exhaustive study, they made their proposal. What he should do, they said, was leave the present elevators alone and add two new elevators at the ends of the central corridor. This solution, they said, would cost a little more, $150,000 to be precise, but would save tenants much more time, an average of 35 seconds

shaved off the waiting time on each floor. "My, that should do the trick," he said uneasily, "but I will have to consult the owners. I'll let you know."

This information put the manager in a grave dilemma. He knew the owners would not spend that much, and complaints from tenants were growing louder and more angry. In a fever he went to the Yellow Pages looking for someone to help him with his problem. His eyes skimmed the page:

- "Probabilities"
- "Probers"
- "Problem Consultants."

"That's what I need," he said, "a problem consultant!" He quickly dialed the number.

Now this problem consultant was a strange fellow. He practically went to sleep while the building manager described the problem. And for the next few days he wandered aimlessly through the building, doing nothing as far as the building manager could see. On the third day he wandered into the manager's office and slouched into a chair.

"Well," he began, "you told me that your problem was slow elevators. That suggested that your solution to tenant complaints was faster elevators. But I did some checking. Slow elevators wasn't really your problem. What those folks were trying to tell you is that they are bored stiff while waiting for the elevators. That's your real problem."

So for less than $1,000, mirrors were installed beside the elevators on every floor. Women straightened their hair, men their ties. There were no more complaints.

* * * * * * * * * * * * *

In this step we will take the problem statement--the description of what, where and when the problem IS--and contrast this with what, where and when the problem IS NOT. Face-to-face with some important distinctions, you may then begin wondering about causes. Why does the

problem exist in some units but not others? Why does it occur at some times of the year and not others?

The next step is to examine the causes of the problem. You can then check out these causes to see which one best accounts for the problem. Checking out a cause is accomplished by applying it to the distinctions you have generated. Does this particular cause account for where the problem is? For where it is not? For when it is? For when it is not? How? By asking these questions, you determine which cause has the best "fit" with the problem. This is known as "the most probable cause;" that's the one you work on.

TRAINER

(may be duplicated as
a handout for trainees)

REVIEW

You have identified a problem.

You have stated it.

You have identified the most probable cause of the problem.

You are now ready to plan your change effort by:

WRITING GOAL STATEMENTS

Once you have identified the most probable cause of your problem, you may select one of three goals. First, you might try to ELIMINATE or REDUCE THE CAUSE of the problem. Sometimes, however, eliminating the cause is not practical or desirable. You may choose, then a second method--ADAPT TO THE EFFECTS. That is, adjust your work to the consequences of the cause. Third, your goal may be directed toward BUYING TIME. Some causes will die a natural death or cannot be changed for a period of time.

At this point, you need to arrive at goal statement to help guide your action. A goal statement should identify three things:

- the target of your activity (who or what);
- the specific results or actions (outcomes) you want to achieve in relation to the target--ones that can be measured or observed;
- a minimum criteria for success of the activity--the quantity and/or quality of change you are aiming at. This includes knowing what to measure, how to measure and how to identify and evaluate changes.

The idea is to determine who or what (person, place, thing or condition) gets examined to see if change takes place. A clear goal statement will direct your problem solving efforts. You then will be ready to consider alternatives and select one on which to work.

TRAINER

ACTIVITY NO. 5

1	TASK ANALYSIS
2	PROBLEM IDENTIFICATION
3	PROBLEM SELECTION AND CLARIFICATION
4	PROBLEM ANALYSIS AND DECIDING ON A GOAL
5	CREATING AND SELECTING ALTERNATIVES ← YOU ARE HERE
6	IMPLEMENTATION

Activity Overview: Selecting Alternatives

Part	Activity	Time
A	Introduction: "Selecting An Alternative"	10 min.
B	Getting Ideas Sample Worksheet	35 min.
C	Selecting Alternatives Handout Sample Worksheet	45 min.
	TOTAL TIME	1hr. 30 min.

ACTIVITY NO. 5

CREATING AND SELECTING ALTERNATIVES

Estimated Time:	1 1/2 hrs.
Props:	newsprint, markers tape, *Workbook*, pp. 64-68

Instructions:

Part A: (10 min.)

Introduce the material, *Selecting an Alternative Is...*, pp. 36-37, either by reading or summarizing the content or by reproducing and reviewing the material with trainees.

Part B: (35 min.)

1. Explain that two methods will be used to generate ideas, each of them taking about 10 to 15 minutes. Ask participants to turn to the *Ideas Sample*, p. 64 of *Workbook*, and review with them the rules for brainstorming.
2. For the first step, ask trainees to generate any and all ideas about ways to reach their chosen goal. This can be done in the group as a whole or in subgroups. Some trainers like to "brainstorm" in a larger group.

   Stick to the rules for brainstorming: no criticisms or judgements. The more ideas generated, the better. Write each idea on the newsprint and leave them posted or have a group recorder do it.
3. A second method for listing more ideas is to consider what others have done. If you brainstormed with the whole group, return now to your subgroups.

Using the *Ideas Worksheet*, p. 65 of *Workbook*, ask the subgroups to think about what EPSDT workers in other agencies, counties and states have done to achieve similar goals. Encourage the groups to:

- recall what they read in the booklet *Delivering EPSDT Services*; and
- consider what workers in programs other than EPSDT do to solve similar kinds of problems.

These two steps should generate many ideas.

Part C: (45 min.)

1. Review the criteria for selecting an alternative using the handout *Criteria for Selecting Alternatives*, p. 66. Refer participants to *Selecting an Alternative Sample*, p. 67 of the *Workbook*, and review it with them.
2. Ask the subgroups to review the alternatives generated from brainstorming and from looking at what others have done. Have them record their comments on the worksheet (p. 68). On the basis of this analysis, they should be able to select the most desirable alternative.

   Sometimes it becomes clear that the most desirable alternative might be a new combination of several existing ideas. Remind trainees to be alert to this possibility. You are now ready to consider implementation.

TRAINER
(may be duplicated as
a handout for trainees)

SELECTING AN ALTERNATIVE...

requires creating lots of ideas and then choosing a favorite or "best" way to reach your goals. The first step of this two-step process is generating IDEAS!

Ideas are your ticket to reaching a goal. If you have not been able to define clearly where you want to go--that is, if you have not developed a clear goal statement--then ideas cannot work for you. Remember, you are generating ideas about how you might solve your stated problem.

Taking special time to generate ideas is a highlight of the problem solving process. It's a time to let all the thoughts in your mind run wild, a time to let out some of the ideas that formed while you were carefully working through the steps of problem identification, problem statement, and problem analysis.

The first part of this session will be used to help you air your ideas. Following that, we will help you select the alternative you think represents the "best" way to reach your stated goals from the ideas you have generated.

Ideas may be analyzed by using some general criteria--appropriateness, effectiveness, efficiency, side effects. These criteria guide the decision making process.

To decide	Think about...
appropriateness	Is it right for us to use this kind of strategy? This question includes whether or not the strategy is appropriate in light of the mission of the EPSDT program.

To decide	
effectiveness	Given the size or scope of the problem, will this strategy make enough difference to make it worth doing? Will it reach the stated objective?
efficiency	How costly is this strategy compared to the benefits you will obtain? Is it worth the time, money and energy to be expended?
side effects	What good and/or bad side effects may occur as a result of the strategy?

Let's get some ideas on the table and then formulate a plan.

TRAINER

ACTIVITY NO. 6

1. TASK ANALYSIS
2. PROBLEM IDENTIFICATION
3. PROBLEM SELECTION AND CLARIFICATION
4. PROBLEM ANALYSIS AND DECIDING ON A GOAL
5. CREATING AND SELECTING ALTERNATIVES
6. IMPLEMENTATION ◀ YOU ARE HERE

Activity Overview: Implementation

Part	Activity	Time
A	Introduction: "Implementation Is..."	10 min.
B	An Action Plan: Handout Sample Worksheet	40 min.
C	Summary: "Review and Discuss..."	30 min.
	TOTAL TIME	1 hr., 20 min.

ACTIVITY
NO. 6

IMPLEMENTATION

Estimated Time:	1 hr., 20 min.
Props:	*Worksheets*, pp. 69-71 of *Workbook*

Instructions:

Part A: (10 min.)

Review the material on *Implementation Is...*, p. 41, either by reading or summarizing the content or by reproducing and reviewing the material with trainees.

Part B: (40 min.)

1. Ask trainees to turn to the *Sample, Implementing a Change*, p. 70 of the *Workbook* and review it with them. Refer them also to the *Implementation Handout*, p. 69, of the *Workbook*.
2. Review with the trainees the *Rules For Making an Implementation Plan*.
   - Decide the tasks and resources needed for your plan.
   - Determine the time each task will take.
   - Assign people, dates, and events to those tasks.
   - Use your *Worksheet* to guide you through your implementation action.
3. Ask the subgroups to develop an Implementation Plan, using the *Worksheet*, p. 71 as a guide. Allow them about 30 minutes.
4. Ask each subgroup to share its plan with the others. Let participants review the plans and rate them for feasibility.

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To rate the plans, establish a scale from 1 to 10. The object is for a plan to get the lowest score since a low score indicates there are few blocks to implementation. Ask participants to consider each plan carefully as it is presented. Allow the whole group five minutes to review and assess each plan. Each time the group can identify a real block or deterrent to implementing the solution, the plan gets one point. At the end, total the number of points for each subgroup's plan. The plan with the lowest number of points is the one with the fewest observed problems in implementation.

Part C: (30 min.)

Do not let people leave feeling that plans with high scores are destined to failure. Some participants may need to spend more time working on their implementation plans. Let the session run a bit longer. Finally, using the two ideas below as a guide, conduct a general discussion to consider the ratings.

- Each organization differs. A plan that fails in one setting may prove successful in another.
- No matter how hard you work to assess all the factors involved in changing a problem, unknowns will often materialize along the way. These may effect the implementation plan in both positive and negative directions.

* * * * * * * * *

This is a good time to set up a follow-up to the training event. See p. 42 of this manual for suggestions about training event follow-up.

TRAINER
(may be duplicated as
a handout for trainees)

IMPLEMENTATION IS...

doing something about the problem. It is what many of us have previously regarded as problem solving. Most of us want to jump into the process without a lot of preliminary "fooling around." As a result, we may leave many problems unsolved. This time, however, you have developed a clear goal and have selected the best alternative for achieving it. What remains is to decide what needs to be done, by whom, when, and how.

When you have finished this step of the problem solving process, you will have an orderly way of proceeding, not only with the problems you have identified and worked on here, but also with any other problems that may arise in the future. This problem solving process is a tool that may be implemented effectively in one's personal life as well as on the job. You may not always want to stop and work so carefully through the process on a worksheet, but the process itself is a good one to remember and to use the next time a problem rears its ugly head.

DON'T FORGET FOLLOW-UP

Raise the issue of follow-up with your trainees.

Share the above suggestions with them.

Ask them for their ideas about how to reinforce their action plans.

Decide upon ways to reinforce changes.

Consider ways to adjust the implementation plans along the way.

TRAINER

NEXT STEPS

Section III , which follows, contains all of the work sheets and handouts a group will need to participate in this training. These same pages are contained in the Trainee Workbook. If for some reason you have an inadequate number of trainee work books, you may duplicate the pages you need from this section for your trainees.

Section IV contains a way of helping you organize your thinking before beginning the training event. This might be a good time to review that process. The page which follows is provided for you to jot down notes or ideas you may have about these materials or the planned training session.

Trainer Notes:

III.

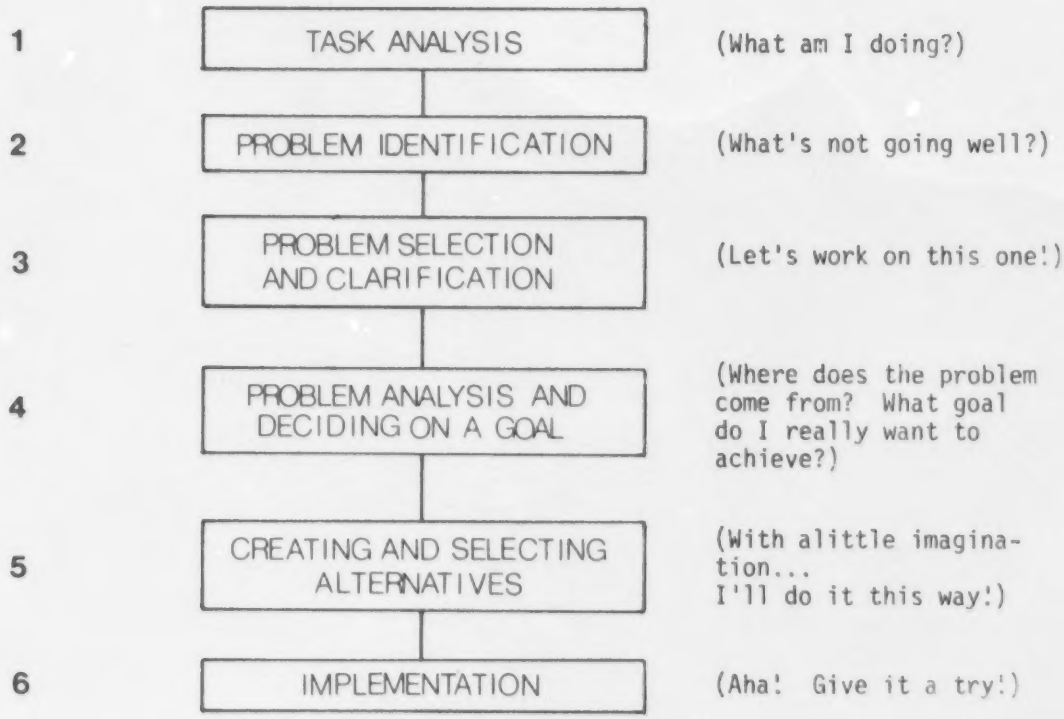
TRAINEE WORKBOOK

TRAINEE

ACTIVITY NO. 1A

HANDOUT

A PROBLEM SOLVING PROCESS



This is a diagram of a process you will learn to use. The goal of this activity is to help you identify real problems that hinder you in carrying out your job as an EPSDT worker. This process involves finding the gap between an ideal and a realistic version of your job.

In the following pages you will find worksheets, handouts, and samples that you will use to identify, state and analyze a problem and to select a strategy to change what is currently a problem on the job.

Gook luck!

TRAINEE

ACTIVITY NO. 1B

WORKSHEET

GENERAL JOB DESCRIPTION FOR AN EPSDT WORKER

We are now looking at the job of an EPSDT worker.* While the specific job description for EPSDT workers will vary from county to county and state to state, certain tasks are common to workers around the country. In general, EPSDT workers' tasks fall into three basic areas:

- dealing with people/clients;
- working with other health and social services providers; and
- handling paperwork.

Use the space below to write a general description of your job, incorporating the above three areas in which you work. The description should be short--a sentence or two--and will be used to organize the specific tasks you do every day.

JOB DESCRIPTION FOR AN EPSDT SERVICE WORKER

*If only one part of your total job is providing EPSDT services, think that portion of your work within the EPSDT program.

TRAINEE

ACTIVITY NO. 1B

WORKSHEET

Your job description might look something like this:

> SAMPLE JOB DESCRIPTION FOR AN EPSDT SERVICE WORKER
>
> A worker identifies and informs eligible clients about EPSDT services including screening and treatment; works with other health and social services personnel to ensure clients get those services; and maintains up-to-date and accurate records on each client.

or

> SAMPLE JOB DESCRIPTION FOR AN EPSDT SERVICE WORKER
>
> A health screening worker administers screening tests, records results of the tests and makes them available to clients and the Department of Social Services' EPSDT case manager.

These general job descriptions can be used as a guide as you write more specific task statements. For each broad area of work (clients, other providers, paper) you identified on the general job description, list the tasks that fall under that area.

A GUIDE TO WRITING TASK STATEMENTS

The rule of thumb for writing task statements is that they contain the 4 Ws and an H:

	Example
1. Who	The astronaut
2. Performs What Action	rockets
3. To Whom (or What)	to the moon
4. Why (for What purpose)	to get green cheese
5. How Often	upon request

As you think about the tasks you perform, use these five criteria to help you write clear, specific statements.

TRAINEE

ACTIVITY NO. 1B

SAMPLE

General Description of job: *An EPSDT Worker:*	TASK STATEMENTS			
	WHO	PERFORMS WHAT	TO WHOM	FOR WHAT PURPOSE
identifies and informs eligible *CLIENTS* about EPSDT services;	an EPSDT (Welfare, Family Services) worker	Provides information about the local EPSDT program	to potentially elgible clients	to encourage them to make a screening appointment
works with *OTHER SERVICE PROVIDERS* to ensure clients receive services; and	a worker	contacts (phones, writes, visits)	health screening providers (clinic, MD, nurse, dentist)	to make screening appointment for the client
maintains up-to-date, accurate *PAPER* records of a client's progress	an EPSDT worker	receives and records	screening form from health screener	to update client's file (record)

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TRAINEE

ACTIVITY NO. 1B

WORKSHEET

General Description of job: *An EPSDT Worker*	TASK STATEMENTS			
	WHO	PERFORMS WHAT	TO WHOM	FOR WHAT PURPOSE
identifies and informs eligible *CLIENTS* about EPSDT services;				
works with *OTHER SERVICE PROVIDERS* to ensure clients receive services: and				
maintains up-to-date accurate *PAPER* records of a client's progress				

TRAINEE

ACTIVITY NO. 1B

SAMPLE

SUMMARY--TASK ANALYSIS

GENERAL DESCRIPTION	TASK STATEMENTS (who does what to whom, why)	FREQUENCY (how often)	IMPORTANCE
An EPSDT worker identifies and informs eligible *CLIENTS* about EPSDT services	1. The EPSDT (Welfare, Family Services) worker provides information about local EPSDT program to a client to encourage him/her to make a screening appointment.	2	1
	2. A worker contacts (phones, writes, visits) health screening providers to make screening appointment for client.	3	2
	3. An EPSDT worker receives and records screening form from health screener to update client's file (record).	2	3
	4.		
	5.		
	6.		
	7.		

You may want to use the tasks identified and summarized on this sheet to select an area or a task during the problem solving section of this training.

KEY:

Frequency: (how often you do it)	Importance: (its importance for you; for a client; for the program)
1 = constantly	1 = very important
2 = frequently	2 = important
3 = rarely	3 = less important

TRAINEE

ACTIVITY NO. 1B

WORKSHEET

SUMMARY--TASK ANALYSIS

GENERAL DESCRIPTION	TASK STATEMENTS (who does what to whom, why)	FREQUENCY (how often)	IMPORTANCE
An EPSDT worker identifies and informs eligible *CLIENTS* about EPSDT services	1.		
	2.		
	3.		
	4.		
	5.		
	6.		
	7.		

You may want to use the tasks identified and summarized on this sheet to select an area or a task during the problem solving section of this training.

KEY:

Frequency: (how often you do it)	Importance: (its importance for you; for a client; for the program)
1 = constantly	1 = very important
2 = frequently	2 = important
3 = rarely	3 = less important

TRAINEE

SAMPLE

ACTIVITY NO. 2A

PROBLEM IDENTIFICATION

TASK STATEMENTS	PROBLEM? Yes	PROBLEM? No	WHAT?
CLIENTS			
1. The worker provides information about local EPSDT program to potentially eligible clients to encourage them to make screening appointments.	X		Clients aren't "sold" on the program.
2.			
3.			
OTHER PEOPLE			
1. A worker contacts health screeners to make screening appointment for client.		X	
2.			
3.			
PAPER			
1. An EPSDT worker receives screening form to update client's file.	X		Health screeners don't automatically send the forms.
2.			
3.			

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TRAINEE

WORKSHEET

ACTIVITY NO. 2A AND 2B

PROBLEM IDENTIFICATION

TASK STATEMENTS	PROBLEM? Yes	PROBLEM? No	WHAT?
CLIENTS 1. 2. 3.			
OTHER PEOPLE 1. 2. 3.			
PAPER 1. 2. 3.			

TRAINEE

ACTIVITY NO. 3B

HANDOUT

IS IT IMPORTANT?

DO YOU FEEL MOTIVATED TO WORK ON IT?

DO YOU THINK YOU CAN HANDLE IT?

RULES FOR ACHIEVING CONSENSUS (agreement within a group)

Achieving consensus is a decision making process that makes use of all available resources and resolves conflict creatively. Usually, consensus is difficult to reach. One person's ideas about a problem may not meet with everyone else's approval. Complete agreement is not the goal; it is rarely achieved. But, each individual should be able to accept group decisions based on logic and feasibility.

1. Avoid arguing only for your own choices. Present your arguments logically, but consider the opinions of others before you push further.
2. Don't assume someone must win and someone must lose. If discussion reaches a stand-off, look for acceptable alternatives.
3. Don't change your mind just to achieve harmony.
4. Avoid achieving consensus by such means as majority vote, coin flips or drawing straws.

"I'll make you an offer you can't refuse..."

"No person is an island."

"A house divided against itself cannot stand."

"Two heads are better than none."

TRAINEE

ACTIVITY NO. 3C

SAMPLE

PROBLEM CLARIFICATION

	Problem Clarification	Problem Clarification
WHAT? What unit, person, thing, group of people, condition is involved? What's wrong with it?	About one-half of eligible clients contacted by EPSDT workers do not make appointments for screening.	
WHERE? Where does it occur (in some physical space, in some sequence of events, etc.)	In X county Welfare Office, with family service workers; John Doe.	
WHEN? When (in clock or calendar time) does it occur? What units or people are involved?	Since EPSDT program was started; especially bad during summer months when about one-half clients refuse.	

TRAINEE

ACTIVITY NO. 3C

WORKSHEET

PROBLEM CLARIFICATION

WHAT?

What unit, person, thing, group of people, condition is involved?

What's wrong with it?

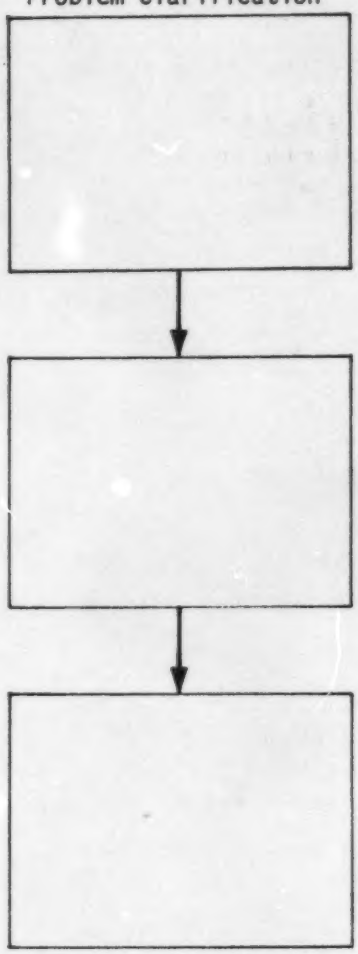
WHERE?

Where does it occur (in some physical space, in some sequence of events, etc.)

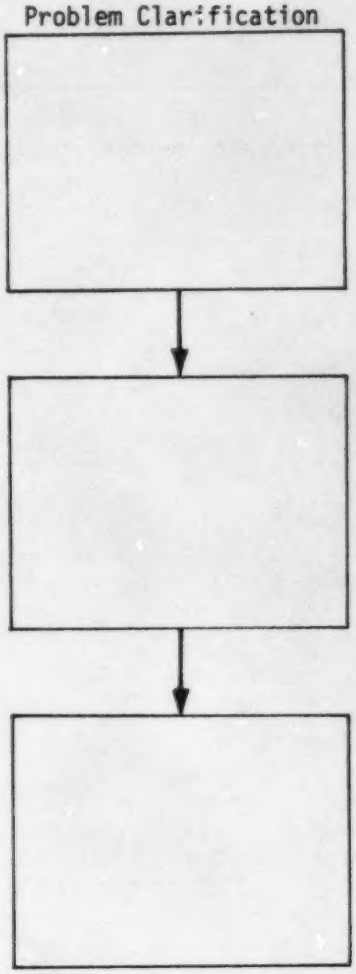
WHEN?

When (in clock or calendar time) does it occur? What units or people are involved?

Problem Clarification



Problem Clarification



TRAINEE

ACTIVITY NO. 4B

HANDOUT

ANALYZING THE PROBLEM

ASK YOURSELF...

Why does the problem exist in some units and not in others?

Why does it occur at some times of the year and not others?

Why does it exist with some people and not others?

Does it go away and then return?

What are some explanations for these differences?

IF YOU ARE LOOKING FOR REASONS...

Does a particular cause account for where the problem is? Is not? When the problem is? Is not? How?

Which cause seems to best "fit" the problem?

Get your questions out of your mind by asking them out loud and writing them down.

Analysis means looking into places you never looked before.

The trick to solving a problem is to find the bridge between the "way things are" and the "way you want them to be."

To learn about something is to take it into your mind and compare it with something that is already there...

TRAINEE

SAMPLE

ACTIVITY NO. 4B

PROBLEM ANALYSIS

WHAT the Problem IS	WHERE the Problem IS	WHEN the Problem IS
clients do not enroll in the program	X County Family Service worker, John Doe	since program began mostly during summer
WHAT the Problem IS NOT	**WHERE the Problem IS NOT**	**WHEN the Problem IS NOT**
clients showing for screening	Protective Services worker, Betty Boop	less in winter
Possible Cause(s)	**Possible Cause(s)**	**Possible Cause(s)**
- There may be conflict with ethnic or religious, medical practices. - Clients have previous bad experience with health care system. - Screening clinics are out of the neighborhood. - Client and worker speak different native languages.	- John is a new worker. - John is male. - Betty uses follow-up calls to discuss the program. - John has never had training about EPSDT services. - X County is multi-ethnic.	- All kids are at home in summer. - Kids look healthier in summer. - Screening clinics in schools closed in summer. - Teenagers have summer jobs.

Most Probable Cause(s):

*- Conflict between ethnic or religious practices. or John has had no EPSDT training. or Kids seem healthier in summer.
*- Language barrier.

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TRAINEE

ACTIVITY NO. 4B

WORKSHEET

PROBLEM ANALYSIS

FILL IN PROBLEM TATEMENT

WHAT the Problem IS	WHERE the Problem IS	WHEN the Problem IS
WHAT the Problem IS NOT	**WHERE the Problem IS NOT**	**WHEN the Problem IS NOT**
Possible Cause(s)	**Possible Cause(s)**	**Possible Cause(s)**

Most Probable Cause(s):
SELECT ONE TO WORK ON!

TRAINEE

ACTIVITY NO. 4C

SAMPLE

GOAL STATEMENT

	Target (Who/What)	Observable (Results or Actions)	Minimum Criteria of Success (How do you know?) (Measured by What?)
GOAL STATEMENT:	- Clients all contacted by all service workers... - All Welfare workers...	will make a screening appointment... will make a screening appointment for eligibles...	75% of the time after at least two contacts. 75% of the time.
GOAL STATEMENT:	Provide EPSDT program to clients in their own language...	to encourage them to make a screening appointment...	75% of the time.
GOAL STATEMENT:	To show clients...	EPSDT health services do not conflict with ethnic or religious beliefs...	so they will make screening appointments 75% of the time.

"Why did the chicken cross over the road?"

"HAPPINESS IS..."

A clear statement of where you want to go is like a light at the end of the tunnel.

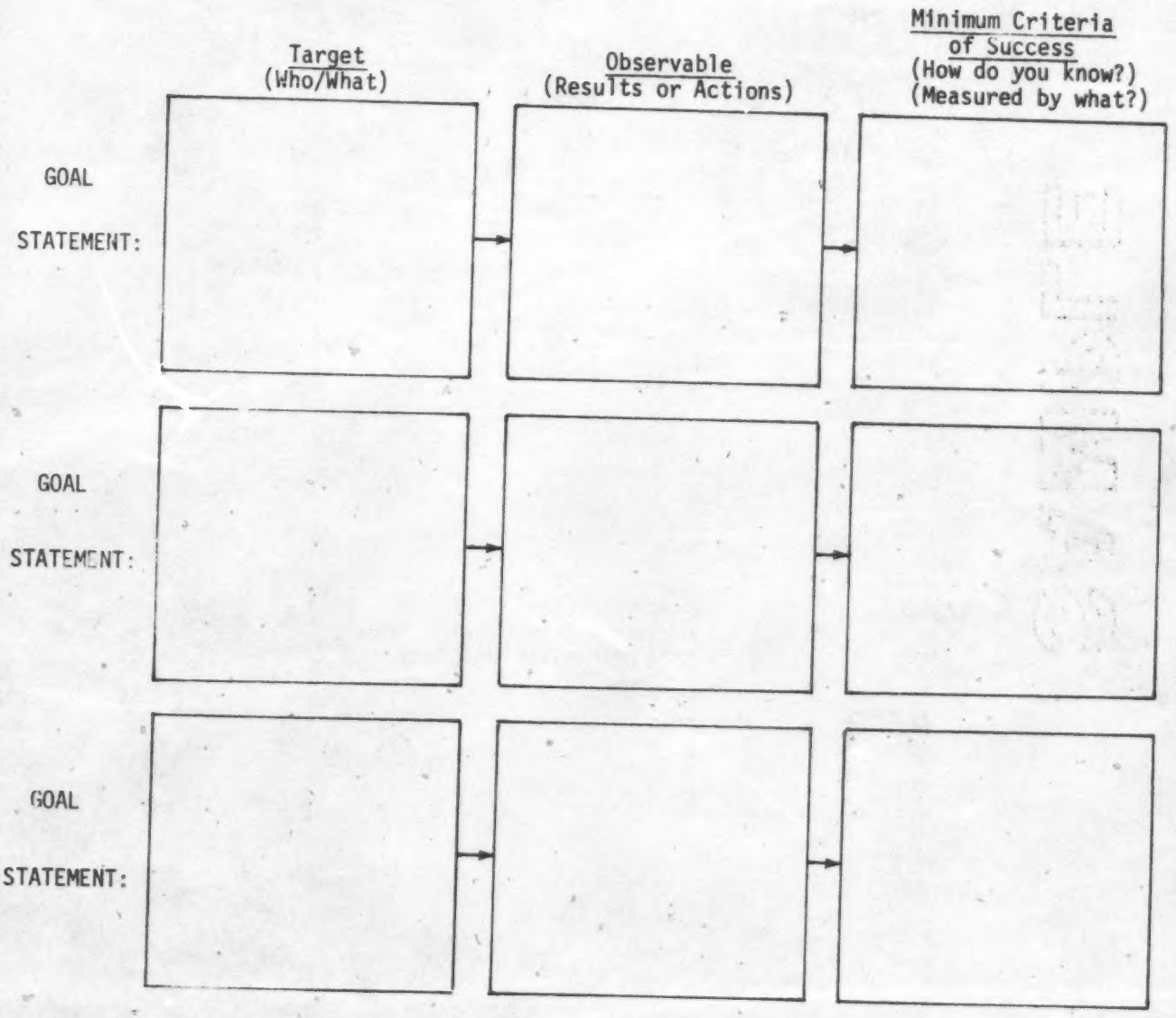
"Before you get on the bus, you ought to check where it is going."

TRAINEE

ACTIVITY NO. 4C

WORKSHEET

GOAL STATEMENT



TRAINEE

SAMPLE

ACTIVITY NO. 5B

IDEAS

IDEAS BY BRAINSTORMING

Goal Statement:

To get workers to explain EPSDT in native language to encourage clients to make appointments.

How To Brainstorm:

Brainstorming is a method for a few people to generate lots of ideas about how to reach a goal in a short time. The rules are simple:

1. Limit any brainstorming session to 10 minutes.
2. Many ideas are desired.
3. Free-wheel: Toss out any idea, even if it seems impractical.
4. Tag-on: Make a new idea out of the last one by changing it somehow.
5. Defer judgement: Criticism of ideas comes later.

IDEAS!:

- Print materials in Spanish (or Chinese or whatever).
- Hire bi-lingual workers.
- Hire para professionals to speak with clients of different backgrounds.
- Go to local churches and present talk in Spanish (Chinese).

GETTING IDEAS FROM WHAT OTHERS HAVE DONE

Goal Statement:

Clarify for clients that EPSDT does not conflict with religious or ethnic beliefs.

How To Recall What Others Have Done:

1. Think of some of the ways EPSDT workers in other states tried to achieve the above goal as illustrated in the booklet, *Delivering EPSDT Services*.
2. "Tag-on" any ideas you have from reading about other solutions.
3. What are some things you have already tried?
4. Defer judgement, criticism of those ideas.

MORE IDEAS!:

- Get support of natural healers.
- Convince a neighbor to talk to client.

TRAINEE

WORKSHEET

ACTIVITY NO. 5B

IDEAS

IDEAS BY BRAINSTORMING

Goal Statement:

How To Brainstorm:

Brainstorming is a method for a few people to generate lots of ideas about how to reach a goal in a short time. The rules are simple:

1. Limit any brainstorming session to 10 minutes.
2. Many ideas are desired.
3. Free-wheel: Toss out any idea, even if it seem impractical.
4. Tag-on: Make a new idea out of the last one by changing it somehow.
5. Defer judgement: Criticism of ideas comes later.

IDEAS!:

GETTING IDEAS FROM WHAT OTHERS HAVE DONE

Goal Statement:

How To Recall What Others Have Done:

1. Think of some of the ways EPSDT workers in other states tried to achieve the above goal as illustrated in the booklet, *Delivering EPSDT Services*.
2. "Tag-on" any ideas you have from reading about other solutions.
3. What are some things you have already tried?
4. Defer judgement, criticism of those ideas.

MORE IDEAS!:

TRAINEE

ACTIVITY NO. 5C

HANDOUT

SELECTING ALTERNATIVES

CRITERIA FOR SELECTING ALTERNATIVES

To decide:	To think about:
appropriateness	Is it right for us to use this kind of strategy? (This question includes dealing with whether or not the strategy is appropriate in light of the mission of the EPSDT program.)
effectiveness	Given the size or scope of the problem, will this strategy make enough difference to make it worth doing? Will it reach the stated objective?
efficiency	How costly is this strategy compared to the benefits you will obtain? Is it worth the time, money, energy to be expended?
side effects	What good and/or bad side effects might occur as a result of the strategy?

"You don't have to justify an idea, only the action that follows."

It sounds good, but..."

"The difference between one idea and another is that one gets closer to what we want to happen..."

"Go to the library."

"Originality is simply a fresh pair of eyes." - Woodrow Wilson

A winning idea has played "king-of-the-mountain and won."

TRAINEE

ACTIVITY NO. 5C

SAMPLE

SELECTING AN ALTERNATIVE

	STRATEGY (Idea)	APPROPRIATE? (Is it "right" for us given the mission of EPSDT?)	EFFECTIVE? (How close will we come to the stated goal?)	EFFICIENT? (Compared to the benefits, how costly is it in terms of time, money and energy expended?)	SIDE EFFECTS (What might happen as a result of doing this?)
CAUSE #1	A. Print materials in Spanish.	yes	hard to say		
	B. Get supervisor to start "bilingual" program.	yes	solves many workers' problems	yes; uses resources at hand	increase in program scope
	Hire bilingual workers.	yes		no; hard to find, train	
	C. Hire paraprofessionals to talk with some clients.	yes		slow, but may be most effective	none
CAUSE #2	D. Visit local natural healer for support.	maybe	long range, maybe	costly in energy, risk	he may cause you to lose face or fight you
	E. Enlist aid of neighbor to talk to client.	yes	on individual cases, may work	costly in time, but may have long run efficiency	increased visibility in a neighborhood
	F. Discredit natural healer in eyes of community.	no	not at all		clients may not come to EPSDT at all

TRAINEE

ACTIVITY NO. 5C

WORKSHEET

SELECTING AN ALTERNATIVE

	STRATEGY (Idea)	APPROPRIATE? (Is it "right" for us given the mission of EPSDT?)	EFFECTIVE? (How close will we come to the stated goal?)	EFFICIENT? (Compared to the benefits, how costly is it in terms of time, money and energy expended?)	SIDE EFFECTS (What might happen as a result of doing this?)
CAUSE #1					
CAUSE #2					

TRAINEE

ACTIVITY NO. 6B

HANDOUT

IMPLEMENTATION

RULES FOR MAKING AN IMPLEMENTATION PLAN

1. Decide the tasks and resources needed for your plan.
2. Determine the time each task will take.
3. Assign people, dates and events to those tasks.
4. Use your *Worksheet* to guide you through your implementation action.

BEEF UP SUPPORT FOR YOUR PLAN!

REINFORCE YOUR EFFORTS!

1. (For yourself): Do you have misgivings? Fears? Do they keep you from forging ahead? STOP. Reconsider the logic of your plan. (Pretty good, yes?) Examine those fears. Consider your motivations. This road map was a good one. This will improve your work life!
2. Again, specify those things you want to achieve from your action plan. You are specifying performance! You know what you want.
3. Help your idea to help itself. Advocate it. Explain the benefits to others. Get them to pull while you push from behind.
4. Live up to your plan. Name it. Identify it. Make a pun to identify it; then try to live up to it.

"THINK"

"Plan ahead. The consequence of following a wrong idea might be worse than no idea at all."

"Since actions speak louder than words, try not to scream with your feet in your mouth."

"Every problem has hidden contingencies...the moment things are settled, the world shifts and new things come up."

TRAINEE

ACTIVITY NO. 6B

SAMPLE

IMPLEMENTING A CHANGE

Strategy: Work with supervisor to set up bi-lingual awareness program.

TASKS:	WHEN?	WHO?	RESOURCES
1. Print materials in Spanish.	by December	Jack Sprat & Julio Diaz	- cost of printing - cost of translation - worker time - secretarial time
2. Hire two para-professionals part-time to use for follow-up.	by October	unknown	- Community Outreach - Agency - Day Care Center
3. Speak to supervisor in next county where they have a similar program.	by November	supervisor: John T.	- Sylvia D. who knows John T. - visiting nurse who has worked with them

TRAINEE

ACTIVITY NO. 6B

WORKSHEET

IMPLEMENTING A CHANGE

Strategy:			
TASKS:	WHEN?	WHO?	RESOURCES
1.			
2.			
3.			
4.			

IV.

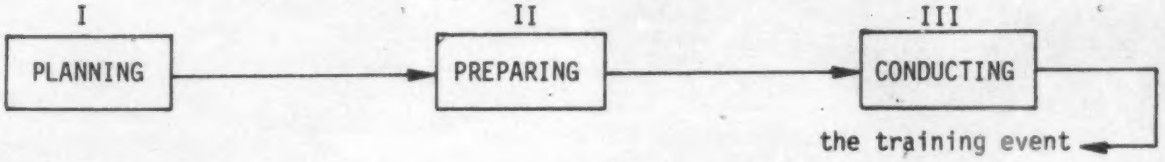
AIDS
FOR A TRAINER

ORGANIZING YOUR TRAINING EFFORT

Training is a place to share ideas, meet people and find reinforcement for successful performance. Since a trainer can help set the climate for any training session, a trainer who allows people to talk, who listens when trainees express ideas or confusion, and who provides specific feedback to them about their involvement in the program is setting the proper climate for the session. Allowing individuals an active role in the sessions will probably increase their involvement, reinforce what they have learned, and make the trainer's job easier.

The trainer's job is simplified when s/he does a thorough job of planning, preparing for the training event, and remembering all the little details while conducting or producing the training event. These three phases in the training process are illustrated below.

Steps in the Training Process



TASKS			
	1. Set objectives	1. Establish a time-line	1. Review checklist for event
	2. Establish content	2. Contact trainees	2. TRAIN
	3. Select methods	3. Acquire organizational support	3. Evaluate
	4. Select trainers	4. Arrange for: - equipment - rooms - materials	
	5. Design or order training materials	5. Review content with trainers; or practice training yourself	

PLANNING
for training

The first thing to determine are the training objectives. These can be stated as "outcomes." Objectives establish the content and method of presentation. Once you have identified them, you should have little trouble filling in the *Planning Worksheet*.

At a later stage, these objectives will help you evaluate your effort. If you have stated clearly WHAT you expect to accomplish by the training, you will have a basis for looking at whether or not the training has accomplished your aims.

When you come to the last step--evaluating what you have done--your training objectives will provide you with the basis for determining whether or not you have done what you set out to do.

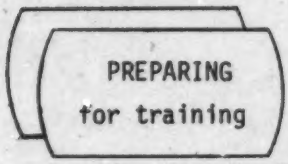
PLANNING WORKSHEET

TRAINING PROGRAM: (name) _____

TRAINEES: (who) _____ (how many): _____

PURPOSE: _____

Outcome You Want: Your objective- be behaviorally specific	Knowledge Required: (to do task/outcome desired)	and Skills to be Developed:	References: Resources: Equipment:	Learning Points: "essence" of content, knowledge/skill	Method of Presentation: (group experiences)



A training event usually requires the gathering together of many people and things. Advance planning is the key to getting everything together, at one place, on time. To help you establish a time-line for each of the parts necessary for your training, see the *Preparation Worksheet* on the next page.

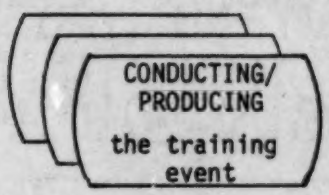
The list of questions below can help you consider some of the organizational factors that may have an effect on your training event.

- How clear are participants' expectations of the training event? Do they know why they are being asked to take part?
- What are the levels or jobs of your trainees? Are they all on the same job rung?
- How relevant is this training to actual job performance?
- How clear are your objectives for this training?
- Other than trainees, who else in the agency is involved in this training event? Have they helped plan it? Will they help run it? Do they openly support it?

TRAINER

PREPARATION WORKSHEET

		TIME-LINE (years, months, weeks, days)			
CONTENT PREPARATION	CONTENT:				
	Develop and Review Content				
	Arrange for Trainers				
	Develop Materials				
	Practice				
OTHER RESOURCES	LOGISTICS:				
	Contact Trainees				
	Agency Support				
	Rooms and Equipment				
	Materials				
	Other				



If you have adequately planned and prepared, the training event itself should run smoothly. Use the *Event Guide* to make certain you have everything necessary for the training session.

Some trainers also find a trainer's notebook helpful. The notebook can be an aid in organizing the training event as well as making certain you have covered everything you have planned. Your notebook might have subsections for each session or activity. These subsections might include:

- the objectives for the session;
- an agenda for the session;
- an outline of the content to be presented;
- a copy of any handouts you are using;
- a few brief closing or summarizing of points covered; and
- space to make notes on participants' responses to the session.

If one of your on-going responsibilities is to conduct or facilitate training, you may want to begin developing a resource file to fill this need.

What follows is a suggestion of how to develop your personal notebook of training resources. Use it to:

- help you think about kinds of resources not previously utilized;
- serve as a model of one way of organizing training resources; and
- provide a structure for sharing information about resources with other supervisors, both in and outside this training session.

Location can and does affect the kinds and quality of resources available. Some resources, however, may be implemented on a regional basis, and the regional staff development specialist or program specialist may know about resources appropriate for your staff development and training needs. Following the *Event Guide* you will find a description and sample of a trainer's resource file.

EVENT GUIDE

I. PROGRAM

Name: _____

Type of training: workshop ( ) lecture ( ) orientation ( )
voluntary ( ) mandatory ( ) pre-registration ( )

II. PRE-PLANNING SCHEDULE

Need assessed: _____

Target group: _____

Key administrative contacts: _____

III. LEAD TIME SCHEDULE

Selection of site/facility: _____

Location: _____ Date: _____ Time: ____

Speakers: _____ Contacted: ___ Confirmed: ____

Equipment needed: _____

Handout material: to be drafted: _____ already drafted: ___
date to typers: _____ date returned: ____

Registration forms/memos: _____
to whom sent: _____ deadline date: ____

Agenda prepared: _____
date sent: _____ to whom sent: _____

Number of sessions: _____

Size of group expected: _____

IV. EVALUATION AND FEEDBACK PLAN

_____

_____

_____

_____

_____

_____

V. LOGISTICS

Sign-in sheets: yes ( ) no ( )

Agendas: yes ( ) no ( )

Handouts (amounts): yes ( ) no ( )

Blackboard: _____ chalk: _____

Lectern: yes ( ) no ( )

Water pitcher: yes ( ) no ( )

Glasses: yes ( ) no ( )

Microphone: yes ( ) no ( )

Check lighting: _____ converters: _____

Check outlets: _____ extension cords: _____

ROOM ARRANGEMENTS

Theatre style: _____ classroom style: _____

Table: _____ chairs: _____ ashtrays: _____

Posters/signs: yes ( ) no ( )

Bulletin board: yes ( ) no ( )

(post notice if change in program)

Pencils: _____ paper: _____ note pads: _____

Badges/name tags: _____ table for handouts: _____

Music: yes ( ) no ( )

Guests or dignitaries: _____

A TRAINER'S RESOURCE FILE: MANAGING TRAINING RESOURCES

Many of the materials have been provided for this training. However, as people develop on their jobs and as new workers join the agency, new needs arise for additional training. If one of your responsibilities is to help workers or other staff in your agency receive training for identified needs, you may want to begin developing a resource file that indicates where some skill and knowledge can be had.

What follows is one supervisor's notebook of training resources. This materials is designed to:

- help you think about kinds of resources you have not used before;
- serve as a model for organizing training resources; and
- provide a structure for sharing information with other supervisors.

People and agency resources available to you and your unit vary in different areas of a state. However, some resources may be employed on a regional basis. The regional staff development specialist or program specialist may know about resources within the region that meet your staff development and training needs. On the following page is a list of "informants" or potential stockpiles of information about training resources.

INFORMANTS ON TRAINING

POTENTIAL SUPPLIERS OF TRAINING RESOURCES	WHAT'S ACTUALLY AVAILABLE TO YOU (fill this in)
Regional staff development specialists	
Regional program specialists	
State office staff development library	
Local public library	
Child welfare and social work journals, such as: - Child Welfare - Public Welfare - Children Today - Health and Social Work (NASW) - The Health Care Financing Administration Record (HCFA/HEW)	
University/college/community - college libraries - film or media centers - college faculty - graduate students	
Other DSS program supervisors	
Staff development and training journals such as: - Journal of the American Society of Trainers and Developers	
Other agency staff	
Public Health Department staff	

When you have completed this list, go to the next page and examine a sample page that might go into your own trainer's resource file.

RESOURCE FILE

TASK:

EXAMPLE: Interview potential clients

Resources: (name, agency) or (name, book)	(address, phone) or location)	(training need addressed)
Examples:		
DSS Training "Interviewing Clients"	DSS state office Staff Development Unit attn: John Doe	outreach skills interpersonal skills interviewing skills
Pfeiffer, J.J. and John E. Jones, A Handbook of Structured Experiences for Human Relations Training, pp. xx, Iowa City, University Associates Press, 1971	public library or state office see John Doe	communication skills appropriate feedback

ADDITIONAL EPSDT TRAINING MATERIALS

Orientation to EPSDT; Training Guide A

EPSDT: Overview of the Medicaid Early and Periodic Screening, Diagnosis and Treatment Program

EPSDT: A Brief History of the Medicaid Early and Periodic Screening, Diagnosis and Treatment Program

EPSDT: The Administrative Organization of the Medicaid Early and Periodic Screening, Diagnosis and Treatment Program

EPSDT: The Clients of EPSDT and Their Experiences with Medical Services

EPSDT: Child Health Information For Workers in the Medicaid EPSDT Program

EPSDT: Delivering EPSDT Services

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